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FinancialPlanning

Retirement

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By Rob Burgess
Reporter

Hello!

As I mentioned before, I am excited to take on "The Ladder," a series by Financial Planning that looks at how executives and leaders in the wealth management industry made it to where they are today — and what you can learn from them.

I started with Eric Franklin, managing principal at $39 million AUM registered investment advisory Prospero Wealth in Seattle, who spent over 20 years learning the tech world before starting his RIA.

I hope you'll check it along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Wednesday!

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The Ladder: How patience paid off for the founder of an RIA that serves tech professionals

The former Amazon project manager now caters his firm to serving tech professionals.

- **Ask an Advisor: Advising couples with ESG investing when they disagree**
  Several advisors answered the call with their strategies for tackling this potentially sticky situation.
- **How financial advisors can assist clients in successfully navigating career changes**

A record number of Americans expect to be unemployed soon, giving advisors opportunities to help them plan.

- **Market volatility and a contentious election year caused advisor confidence to plummet**
  However, financial advisors have been trying to ease client fears by taking a longer view.
- **Back-to-school is a reminder for financial advisors to review clients' educational savings goals**
  The best time to start saving for college expenses is right now.

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